

Investments

Type of Account	Account number	Entity & address	Contact person	Phone Number	Payment amount	Payment due by	Payment type
IRA							
401(k)							
SIP, Payroll, Christmas							
Stocks or bonds							
Mutual funds							
Automatic savings plan							
Precious metals							

Bank & Other Financial Accounts

Type of Account	Account number	Entity & address	Contact person	Phone Number
Checking account				
Savings account				

Automatic debits from Checking Account

Type of Account	Account number	Entity & address	Contact person	Phone Number	Debit amount	Date debit made

Credit & Debit Cards

Type of Account	Account number	Entity & address	Contact person	Phone Number	Payment due by	Payment type

Account Information and End-of-Life Planning - Page 3 of 5

Dues, funds, donations or memberships (religious, philanthropic, political, educational, charitable, etc.)

Type of Account	Entity name	Entity & address	Contact person	Phone Number	Payment amount	Payment due	Tax Deductible?

Professionals

Type of Account	Name	Org./Business name	Entity & address	Contact person	Phone Number	Notes
Religious leader						
Doctor						
Eye doctor						
Dentist						
Accountant						
Attorney or law firm						
Banker						
Investment advisor						
Plumber						
Electrician						
Exterminator						

Legal Documents in Place

Type of Account	Prepared by	Location	Person Responsible	Phone Number	Date last reviewed
Last will & testament					
Living will					
Living trust					
Health care power of attorney					
DNI/DNR order					

Hospitals of Choice

Hospital Name	Location	Phone Number

Taxes Due

Taxable entity	Tax Parcel Number	Make payment to	Address	Contact person	Phone Number
Land					
Home					
Automobile					
Automobile					
Boat					
Motorcycle					
RV/camper					

Prescriptions, Over the Counter Medications, Vitamins, Minerals & Supplements

Name	Dosage	Filled by	Acquisition schedule	Account number	Contact person	Phone Number

Personal Health Information (corrective lenses, blood type, allergies, health conditions)

Type of information	Data	Notes

